



# Polaris Glossary

## Polaris Navigation

**Polaris Bar** – Main form of navigation for Polaris, it provides access to all functions through drop down menus or marbles.



**Workform** – Main page of any Polaris function key (Check in, Check Out, Patron Registration, etc...)

**Cool Bar** – Mid page bar of functions that change based on being in checkout, holds, patron status and more.

Ex. Check out Cool Bar



## Check In



**Bulk Mode** – Default setting for check in, allows check in of multiple materials without stops for patron information, use the right click to move to patron record, item record and more



**Normal Mode** – Check in setting allows for check in of items with immediate access to patron fines, etc... on the same screen



**In-House Mode** – Check in mode to record item used in the library and left on tables, etc... collects data for statistical purposes only, does not add to circulation numbers and is not currently used at all locations

## Check Out & Patron Records



**Patron Record** – F7, focuses on the specifics of a patron such as address, phone and personal data



**Patron Status** – F6, Access to all areas of a patron record including registration and focuses on actions related to the patron account such as fines, holds, items out and more.



**Notes** – All comments and stops on a patron record are considered notices. They

make be blocks (stop use), notes, messages or a history of actions on the card

**Non-blocking** – notes that may require staff action such as missing parts or items to keep for history such as waivers, these do not block patrons from using the card

**Blocking** – notes that will block patron’s ability to use their card.

**Message to Patron** – Note that is visible to the patron in their account on the PAC, can be marked as read and deleted, if items need to be kept from here than they should be duplicated in the non-blocking note area

**On the Fly** – formerly known as a Fast Add, this allows staff to add a title to the catalog for quick check out. Items will be set to Technical Services and should be addressed by the selector in the branch and then sent on to TS for deletion

**Family Groups/Associations** – Ability to connect members of a family together to enhance card management; **access to this function will be implemented at a later date.**

**Offline Circulation** – Polaris mode to use when the system is down, this will be used for check out only when Horizon is shut down



**Reset Due Date** – Change the due date for materials after they have been checked out to a patron



**Renew** – Renew items already checked out on a patron card



**Estimate Fines** – Polaris includes the ability to estimate fines on items that are currently out and overdue.



**Lost** – Same as in Horizon, this will be used to declare items lost

**Reading History** – This is an optional function available in the patron record in the registration screens. It allows patrons to keep a reading history of items they have checked out over time. Patrons can manage this through the PAC as well.


**Free Day** – Replaces backdating, this is used to check in items at an earlier date such as bookdrop or for exempt fines (set to 1000 days)

### Requests/Holds



**Requests/Holds** - Managed in three different ways throughout Polaris. Indicates a request can be placed on an item. Provides access to all requests attached to a patron’s record. These three icons located in the circulation module of Polaris

allow direct access to queues, branch holds, and other general information about requests.

 **Group Holds** – Holds placed on a number of bibliographic records for the same item which are then grouped together to create a single hold, the first copy available from all record will fill the hold and cancel all others in the group

**Duplicate Holds** – Considered Multiple Copy Holds in Horizon, duplicate holds are for items attached to a specific title on the same patron card, most commonly used for book group titles. These are placed from the item record.


**Copy Specific Requests** – Volume or date specific holds for an item such as an encyclopedia or magazine


**Reactivate** – When a request has been cancelled it can be reactivated for up to seven days and maintain its place in the queue, it does not apply to holds that were not picked up by the patron in time

**Holds/Request Status** – Patron record status for Holds

- Requested
- Available Soon
- Suspended
- Unclaimed
- Expired
- Cancelled
- Shipped

**Searching/Find Tool**

 **Bibliographic Record** – Complete record for materials in the catalog, accessed through the Find Tool (F12).

 **Item Record** – Direct access to individual copies within a bibliographic record, where multiple copy holds need to be placed from, accessed through the Find Tool (F12)

**Find Tool** – F7 for patron records, F6 for patron actions/searching the catalog, and F12 for searching for materials and for all advanced search capabilities

**Shelf Location** – Where an item is actually located on the shelf. This includes a broad range of locations such as Display, Series and Genres.

**Collection** – The general collection code for an item and is more limited than Shelf Location. Adult Fiction is a collection but individual genres such as Mystery are Shelf Locations.

**Material Type** – Replaces IType in Horizon and determines how long an item can check out, what fines are assessed and who may check the item out. There are a limited number of material types.

### Circulation Status Terms

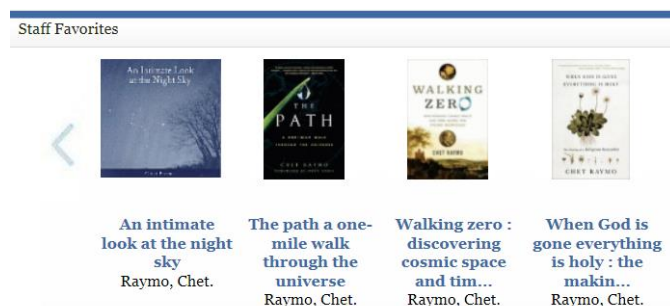
- On Order
- Being Processed – formerly In Processing
- Checked Out
- Checked In
- Recently Returned – formerly Shelving Cart
- In Delivery (Returning Home) – formerly In Transit
- Waiting for Pickup – Formerly Item Being Held
- Transit Hold
- Non-circulating – formerly Reference, Ready Reference and so forth
- Lost
- Trace
- Unavailable (Ex. Storytime)

### Power PAC Terms

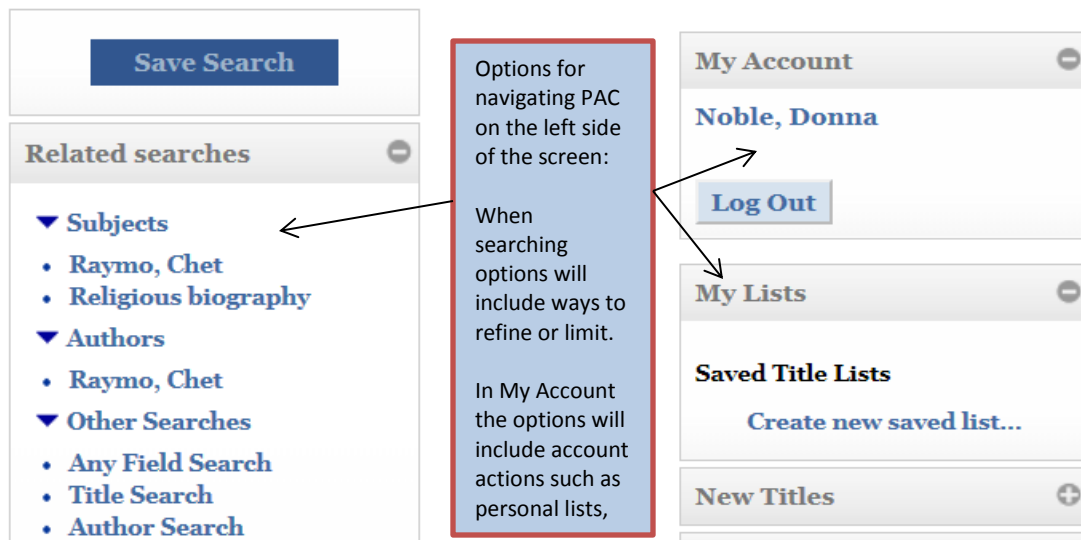
Dashboard – Action menus, bars and buttons located along the top of the PAC  
Include Language, Text Size, Login/Register and Branch selection



Content Carousel – Rotating display on the main page of the PAC which will initially be system materials with eventual branch specific capability



**Limiters/Facets/Left Side Navigators** – Column on the left side of the PAC screen which provides additional functions to limit and manage searches. This column is also in the patron account and includes access points to fines, account information, connections and saved searches.



► **Map It** - A Google generated map of all the locations where an item is location.

**Where is it?** **Where Is It?** – Click on this to find what locations have copies

### Bibliographic Record Results Information

- Summary – Summary of a record that appears when cover art is scrolled over
- Brief Summary – Basic information about a title that appears in the results list
- More Information – Provides access to the complete bibliographic record

**Text It** – Can text call number and other bibliographic information directly to your phone

**Connections** – Social media connections provided through Chilifresh that allow reviews, ratings and sharing of library materials with friends, etc... These include functions such as **Add To Shelf**, **My Current Reads** and **My Wishlist** and are managed from My Account.

**My List/Add to List** – creates and stores a list within Polaris, it does not include the connections/social media functions with Chilifresh.


**Saved Searches** – Use of this function allows users to save actual searches and parameters which can then provide updated search results on an ongoing basis.

### My Account

- Account Details – personal information including password access
- Items Out – All items currently out on a card, includes the ability to renew items

- Fines & Fees – List of fines currently on card, includes ability to pay online
- Holds – All requests on a card, includes the ability to suspend and cancel
- Reading History – patrons can choose to maintain a history of items they have checked out
- Saved Searches -
- Connections – Chilifresh social media connections to share
- Log In/Register - Register replaces the Apply for Library Card tab and is also available at the top of each screen

### **Search (Beyond Subject, Author & Title)**

- Anywhere – similar to General Keyword in Horizon this searches all fields of a record and searches for multiple terms anywhere in a record
- Phrase – Looks for all of the words in the exact order as typed
- Series – System series information. For most complete series information look use the  [Suggestions and more](#) drawer below the record in the More Information screen as it provides Novelist lists for series.
- General Notes – Allows searching of notes in bibliographic records. This includes searches for movie ratings, additional authors or titles, honor books for Newbery's and more.